

“What You and Your Clients Need to Know About Cross-Border Estate and Income Tax Planning”

Join us Wednesday, April 17th to hear Brian Rowbotham, CPA, and Peter Trieu, Tax Director, of Rowbotham & Company LLP Discuss topics including the reporting minefield for persons with foreign accounts, reporting for people who temporarily move abroad for business, U.S. citizens owning property abroad and the use of California trust; foreign succession laws, treaties and US reporting and compliance.

Brian Rowbotham is a CPA with 33 years of experience advising businesses and individuals on complex domestic and international income and estate tax planning. He is the founding partner of the firm that is almost exclusively dedicated to businesses and investors needing domestic tax, international tax and accounting services.

His clients include private and public companies around the globe, U.S. and foreign institutional investors, multinational families and executives and non U.S. investors doing business in the U.S. From 1992 to 2006, he directly supervised the engagement when his firm was engaged by the trustees in Europe to assist with recoveries of funds from one of the largest frauds in U.K. history.

Mr. Rowbotham has been a frequent guest lecturer at the Haas School of Business, UC Berkeley and at the University of San Francisco. He previously taught graduate courses on corporate and partnership taxation at the UC Extension, and has been a speaker for several U.S. and international tax planning organizations including the ITPA and STEP organizations in Europe, Asia and the U.S.

Mr. Rowbotham has previously submitted proposed legislation to the U.S. Treasury in the FIRPTA arena which resulted in changes to final regulations on withholding tax on foreign partnerships with investments in U.S. real property. This past year he issued several commentaries that were critical of IRS procedures and policies in the FBAR amnesty program. He was recently informed that his newsletters were being routed to agents around the country as part of their training materials regarding problems that are encountered by taxpayers attempting to comply with the rules. He is member of Tax Division of the AICPA and past president of the San Francisco Tax Club. Mr. Rowbotham was previously a featured columnist for Outlook, the official journal for the California Society of CPAs and has been a contributor to the Journal of Accountancy and several international tax and investment journals.

Peter Trieu is a Tax Director at Rowbotham & Company. His practice focuses on advising clients regarding domestic and international tax planning and compliance. He also assists clients with their trusts and estate plans. His clients include entrepreneurs, multi-national families, high net-worth individuals and businesses. Peter co-authored "Doing Business in India" published in the May/June 2009 issue of CalCPA magazine. Peter spoke at the 2010 International Tax and Business Conference, CalCPA Education Foundation, discussing "Inbound Tax Planning".

Education & Certifications- Peter is an attorney licensed to practice law in the State of California. He earned a Bachelor of Arts in Business-Economics with a minor in Accounting from UCLA. Peter graduated cum laude from Hastings College of Law. His concentration at Hastings was in taxation in which he received numerous awards, including the American Jurisprudence Award for Taxation of Family Wealth Transfers and for Federal Income Taxation. Peter earned a Master of Laws (LL.M.) in Taxation at Golden Gate University, graduating with honors.

April 17th, 2013

Lafayette Park Hotel

3287 Mt. Diablo Blvd. | Lafayette, CA

6:00 P.M. Wine and Registration

6:30 P.M. Dinner and Speaker

**Registration Fee: \$45.00 dinner (preregister)
\$50.00 (at the door)**

Please send your check today!

or

Pay with a credit card online

<https://www.123signup.com/register?id=syjxp>

Dinner Menu

Salad

Caesar Salad, Garlic croutons, romaine lettuce, parmesan cheese

Entree

Grilled Chicken Breast, mushroom bread pudding with goat cheese, asparagus, mustard jus

Dessert

Pear Tart - Poached pears, almond cream, apricot glaze

*Reservations and cancellations must be received
by Monday, April 15th by 2:00 p.m.*